



PRESENTATION

"Back to Basics"



Did you know?





Top 5 Lessons Learned

1. Strategy
2. Financial Accountability
3. People
4. Client Service
5. Communication



1. Strategy

“All men can see tactics; whereby I conquer [is] that none can see the strategy out of which victory is evolved”. - Sun Tzu (Chinese General and Author 500 BC)

“Hope is not a Strategy” - Rick Page, Author

“Screw it – let’s do it!” - Richard Branson, Entrepreneur / Founder Virgin

“It’s important to have a concise articulation of that strategy so you can get everyone aligned and on the same page without wasting energy on activities that are not useful....” - Vern Harnish, Author

“However beautiful the strategy, you should occasionally look at the results.” – Winston Churchill





Strategy

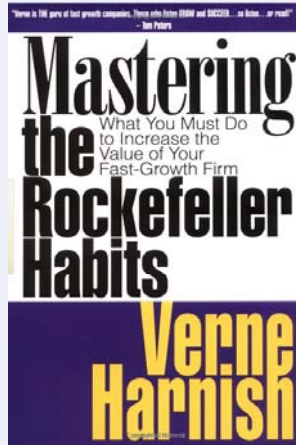


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Strategic Resources



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One Page Strategic Plan

CORPORATE STRATEGIC PLAN 2009-10

COMMONWEALTH LEGAL

Mission: To provide legal services to our clients in a cost-effective, efficient and timely manner.

Vision: To be the leading provider of legal services in our market.

Values: Integrity, Teamwork, Innovation, Quality, Leadership.

Strategic Objectives:

Objective	Action/Program	Timeline	Responsible
1. Increase revenue by 10%	Implement new pricing structure	Q1 2010	CEO
2. Reduce operating expenses by 5%	Review and optimize overhead costs	Q2 2010	COO
3. Improve client satisfaction scores	Implement client feedback program	Ongoing	Client Services
4. Increase employee engagement	Implement employee development program	Q3 2010	HR
5. Enhance brand reputation	Implement social media strategy	Q4 2010	Marketing

Strategic Theme: "Team Success"

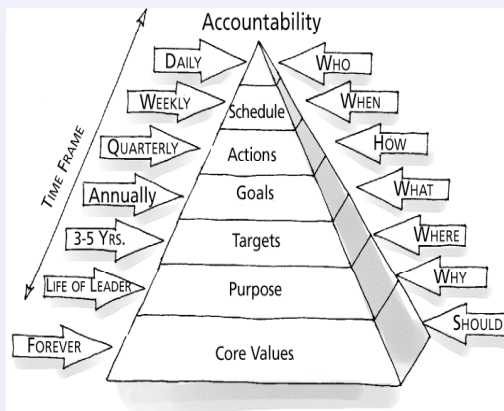
Celebration/Bonus:

- Performance Bonus
- Partnership Bonus
- Retention Bonus
- Client Satisfaction Bonus
- Employee Development Bonus



Foundation of Core Values

1. Honesty & Integrity
2. Teamwork
3. Passion
4. Innovation
5. Quality
6. Leadership





Sample Law Firm Mission Statement

Our mission is to provide our clients with the finest legal service through zealous and aggressive representation, personal attention and professional diligence. When our clients succeed, we succeed. We strive to make lasting relationships with our clients, and do so by being guided by the following principles:

Our clients deserve our personal and timely attention. Calls are returned promptly. We must be accessible. When our clients need us, we must be there for them. To that end, we each have cellular telephones and email access, and make ourselves available, even while on vacations.

Our work must be thorough and effective. We are zealous advocates for our clients. They depend on us to aggressively pursue their goals, leaving no stone unturned. Whether in the courtroom or in our research and pleadings, we strive to find ways to best advance the client's cause.

We are counselors as well as advocates. We communicate in clear language that our clients understand. We advise as well as represent. Our clients deserve to know what we do, why we do it, and how it benefits them.

Our clients are entitled to professionalism from us. We ascribe to the highest professional ethics, and protect their confidences from improper disclosure. Their secrets are safe with us.

Our clients need to know what lies on the legal horizon. We stay abreast of developments in the law and inform our clients of how these changes may affect them.

Our legal services need to be affordable. We use technology and procedures to minimize costs wherever possible.

Our clients' interests are paramount. They are the reason we exist as a firm, and within the bounds of professional ethics, we pursue their interests relentlessly.



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Commonwealth Legal Mission Statement 1999

Commonwealth Legal Inc.: Our Mission

Our mission is to be acknowledged worldwide as Canada's premier, full-service provider of litigation support document management products and services.

acknowledged	Not only must we strive to be the best, but we have to be recognized as the best. We pay attention to our reputation for expertise, reliability, honesty, professionalism, and to our name brand.
worldwide	Though our first goal is to capture and dominate the Canadian market, we intend to generate significant business abroad.
Canada's	One of strengths that we have in the face of competition from large US companies is our Canadian roots, ownership, knowledge and focus. We intend to be truly national, with services and support offered coast to coast through regional offices.
premier	Premier to us means first and best. We are the first and the best full service litigation support company in Canada.
full-service	From strategic planning to project management, from scanning, coding, software, hardware, training, and support, we expect to service our client's every need.
litigation support	Our core business is helping lawyers and their clients prepare for trial by collecting, converting, organizing and enhancing documentary evidence. Though we may move into related fields such as law office back file conversion and "paperless office" projects, we should ensure that our primary target is the litigation/mediation/administrative/tribunal market.
document management	Document management includes not just converting paper to CD, but organizing electronic documents and any discoverable information in whatever format.
products and services	We sell our expertise, our scanning, coding and related computer services. But as a full service company we expect to provide hardware and software, including support, to achieve our mission.



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Microsoft's First Mission Statement

*"A computer on every desk and
in every home."*



Commonwealth Legal Mission Statement 2009

*"Every client empowered with the
right technology solution for
every project"*





2. Financial Accountability

- Make more money than you spend.
- Meaningful financial reports
 - Financial Statements
(*Monthly, Quarterly, Annually*)
 - Management Measures Reports (KPIs)
 - Well Managed Expense Policies
- Task Force Initiatives
- Business Case for Large Expenditures
- Develop a network of advisors



Outsourcing Advantages

- Access to expertise and skills
- Access to world-class capabilities
- Enhanced Internal focus on strategy
- Internal focus on core competencies
- Reduced financial investment
- Scalable resources for overflow
- Clear accountability



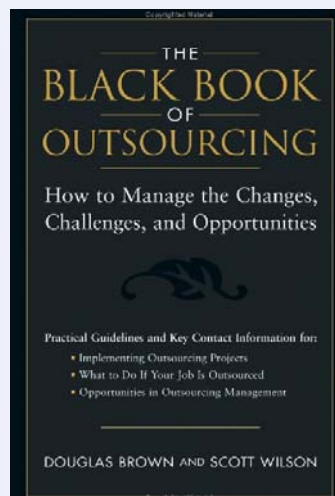


Outsourcing Considerations

1. Does the service relate to our strategy?
2. Is the service a core competency?
3. Do we provide this service continuously?
4. Do we have staff to provide this service?
5. Will the loss of the *content* of this service hurt our organization?
6. Will responsiveness be improved?
7. Will costs be better managed?
8. Will quality expectations be met?



Outsourcing Resources





3. People

*The Right People
In the Right Roles
Doing the Right Things*



Recruitment

- **Resume Screening**
- **First Interview**
- **Job Profile Analysis (Thomas)**
- **Second Interview**
- **Third Interview (Group)**
 - **Skills and Competencies**
 - **Fit to Corporate Values**
 - **Technology Expertise**
 - **Team Presentation: First 90 days**
- **Reference Checks**





Job Descriptions

Job Description Category	Senior Manager	Team Leader
Strategic Leadership; Dept / Initiative	20%	5%
Leadership of Staff	40%	20%
Job Fulfillment (Hand's on reqrmnts)	15%	65%
Product or Service Development	15%	5%
Contribution to Corporate Initiatives	10%	5%
Job Skills and Competencies: 1. <i>Qualifications</i> 2. <i>Responsibilities</i> 3. <i>Effort</i> 4. <i>Environment</i>	Score 95	Score 70



Compensation

“Reward Performance not Loyalty”

Job Description Category	Senior Manager	Team Leader
Base Salary	75%	85%
Team Performance Incentive	15%	5%
Individual Performance Incentive	10%	10%
Corporate Performance Incentive	5%	0%
Overall Compensation Plan	100%	100%





Performance Management

- Professional Development
- Training: CommonKnowledge



4. Client Service

- Focus on Client Needs - Value
- Map out the Customer Experience
- Invest time in Client Relationships
- Break your own rules
- Measure Client Satisfaction
- Deliver on your Promises





5. Communication

Create opportunities to communicate:

1. Company Strategy
2. Obstacles and Threats
3. Results and Achievements

Use:

- *Memos*
- *Newsletters*
- *Town halls*
- *Emails*
- *One-on-Ones*



“Every morning in Africa, a Gazelle wakes up. It knows it must run faster than the fastest lion or it will be killed. Every morning a Lion wakes up. It knows it must outrun the slowest Gazelle or it will starve to death. It doesn't matter whether you are a Lion or a Gazelle... when the sun comes up,you'd better be running.”

Thank-you.

